

UNITED STATES DISTRICT COURT SOUTHERN DISTRICT OF INDIANA



ATTORNEY GUIDE TO HYPERLINKING IN THE FEDERAL COURTS

FEBRUARY 2014

Attorney Guide to Hyperlinking in the Federal Courts

(for Microsoft Word users)

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OVERVIEW OF HYPERLINKING IN FEDERAL COURT

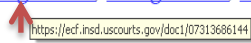
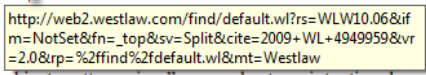
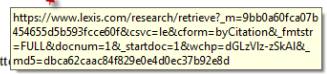
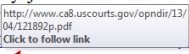
In the internet research world, hyperlinks are a standard way of “drilling down” for more detail or specific information. Just as all web pages contain links to other pages, cases downloaded from legal research services such as Westlaw or Lexis contain links to the cases, statutes, articles, or other sources cited within the opinion. The links allow immediate access by the reader to these referenced materials.

Attorneys can include links to cited law and previous CM/ECF filings in their documents to be filed in CM/ECF, adding another level of persuasion to their writing. Hyperlinks in briefs and other court filings provide quick, easy, and pinpoint access to particular sections of a case, or to specific filings in the court’s record. The attorney can thereby highlight the precise issue presented, and the specific evidence and controlling or persuasive law the court should consider.

Hyperlinks in court filings are very beneficial for court chambers. Court submissions which include links to relevant case law and case filings are easy for chambers staff to review. The attorneys’ arguments can be immediately verified in the context of the relevant law. The judge or judicial clerk is able to read the text of the cited case law on one screen while reading the attorney’s brief on the other. And if a brief contains links to referenced exhibits, and even to specific pages within those exhibits, the judge or judicial clerk can access the relevant evidence without having to navigate through the CM/ECF record. Particularly when dealing with large and complex cases, links save chambers considerable time and effort. Links make it easy for the court to verify – and adopt – the positions taken by an advocate.

Types of Permissible Hyperlinks

The following types of hyperlinks are typically allowed in court documents.

Internal Links	For example, the Table of Contents located at the beginning of this Guide.
Links to documents previously filed in CM/ECF	The defendant has adopted such policy, but presently pending are three motions seeking similar relief. Filing No. 15 , Filing No. 16 , Filing No. 17 
Links to attachments and exhibits being filed with your brief	<p>BRIEF/MEMORANDUM in Support re 97 MOTION for Sanctions Pursuant to FRCP 37, filed by Plaintiff. (Attachments: # 1 Exhibit Exh. A, # 2 Exhibit Exh. B, # 3 Exhibit Exh. C, # 4 Exhibit Exh. D, # 5 Exhibit Exh. E, # 6 Exhibit Exh. F, # 7 Exhibit Exh. G, # 8 Exhibit Exh. H, # 9 Exhibit Exh. I, # 10 Exhibit Exh. J, # 11 Exhibit Exh. K, # 12 Exhibit Exh. L, # 13 Exhibit Exh. M, # 14 Exhibit Exh. N, # 15 Exhibit Exh. O, # 16 Exhibit Exh. P, # 17 Exhibit Exh. S) (Entered: 04/30/2013)</p> <p>Note: Evidence <i>must</i> be filed of record. A hyperlink to a public website where evidence can be found is not a substitute for filing evidence in support of a motion.</p>
Links to case and statute citations Note: Unless a cited case cannot reasonably be found from a public source, it is not necessary to attach copies of cases or statutes to your brief.	<p>For example:</p> <p>Westlaw,</p> <p>by the attorney-client privilege or the work product doctrine. s, 2009 WL 4949959, 2009 U.S. Dist. LEXIS 121753 (D. Colo. : 502:  when a "subject-matter waiver" occurs due to an intentional or</p> <p>Lexis,</p> <p>by the attorney-client privilege or the work product doctrine. s, 2009 WL 4949959, 2009 U.S. Dist. LEXIS 121753 (D. Colo. : 502:  when a "subject-matter</p> <p>or court websites.</p> <p>A party has been fraudulently joined if there is no reasonable basis for predicting that the state law involved. Bradley Timberland Lumber Co., No. 12-1892 (8th Cir. April 8, 2013). </p>

CREATING A HYPERLINKED TABLE OF CONTENTS

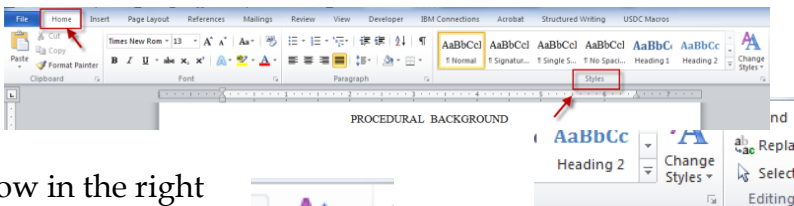

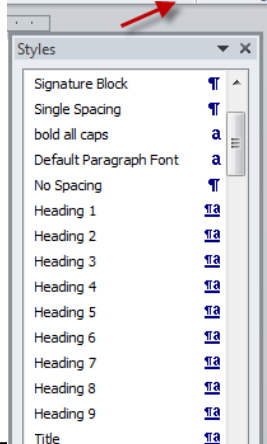
A table of contents in a Word document can include internal hyperlinks for navigating the document. When the document is converted to PDF format, these links will become bookmarks in the PDF document.

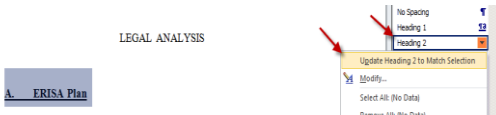
Although there are several methods for creating a table of contents in Word 2010, the one most useful to attorneys (and discussed below), is to create the document, include any headings as you write, and then:

- Mark and format the headings to be included in the table of contents;
- Generate and insert the table of contents; and
- Edit as needed.

Marking and Formatting Table of Contents Entries

To mark and format entries to be included in the table of contents:

STEP	ACTION
1	Create your document, inserting all headings with the format of your choice.
2	Using your cursor, scroll over and select the heading you want to include in the table of contents. <div style="text-align: right;">LEGAL ANALYSIS</div> <div style="text-align: center;"><u>A. ERISA Plan</u></div>
3	<p>From the Styles section on your Home tab,</p>  <p>Click the down arrow in the right lower corner.</p> <p>A drop down list will appear.</p>  <p>Note: There are 9 pre-formatted Heading Styles available in MS Word, but only 2 may be visible in your styles drop-down menu. Additional heading options (3 through 9) will appear, as you make your selections. For example, when you select and apply</p> 

	Heading 2, the Heading 3 option will appear and be available for the next heading level, and so on.	
4	<p>If...</p> <p>You want the text of the table of contents entries to match the headings already created within your document (<i>e.g.</i> font, font color, bold, etc.):</p>	<p>Then...</p> <p>Use your cursor to select the heading to be included in the table of contents.</p>  <p>From the Styles list, Right-click the heading level you wish to apply. In the box that appears, select: Update Heading [x] to Match Selection.</p> <p>Continue until a heading style has been applied to all heading levels within your brief.</p>

You want to:

Set a standard format (e.g. font, font color, bold, etc.), for all headings and table of contents entries created with your Word program,

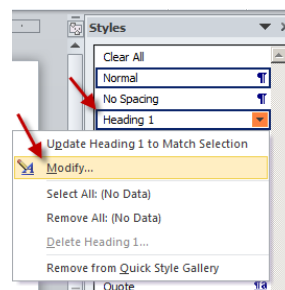
Or

Change the heading format in the brief already created:

From the Styles list,

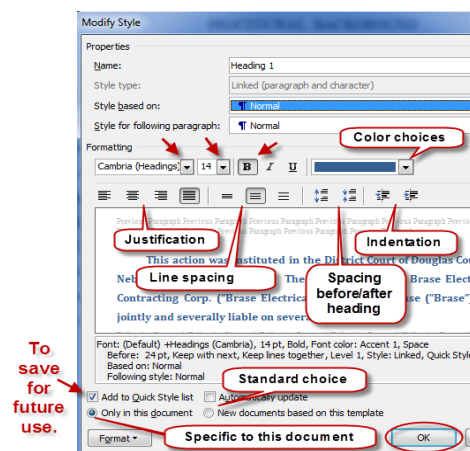
Right-Click the heading level you wish to modify.

In the box that appears, select **Modify** to open the Modify Style box.



Choose text:

- font
- font size
- appearance
- color
- justification
- line spacing



Save settings for:

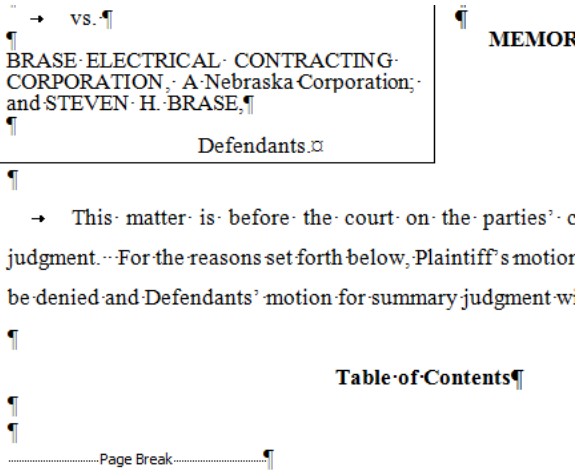
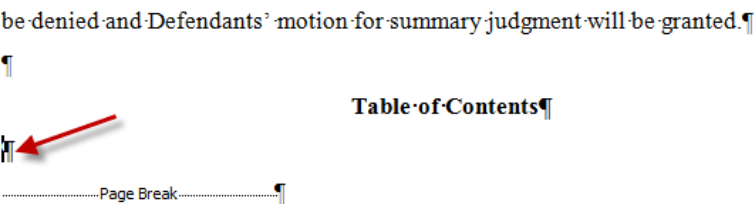
- **only in this document**, or
- all documents created using your standard **template**.
- **Add to Quick Style List**.

Click **OK**.

Scroll through your document. For each heading, select the heading text with your cursor, then click the heading style to be applied.

Generating and Inserting the Table of Contents

To add the Table of Contents to your document:

STEP	ACTION
Place your cursor in the document at the location you want to insert the table of contents. Add a title for the Table of Contents . Enter a few hard returns. (You may want to select the Show/Hide Paragraph Marks on the Home tab.) Control + Enter to insert a page break.	
Place your cursor where the table of contents entries should begin.	

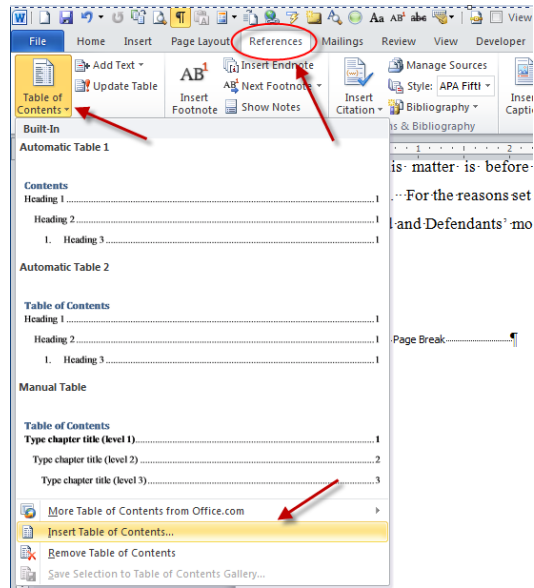
From the
References tab of
your Word ribbon,

Select:

Table of Contents,
and from the menu
that appears,

Select:

**Insert Table of
Contents.**

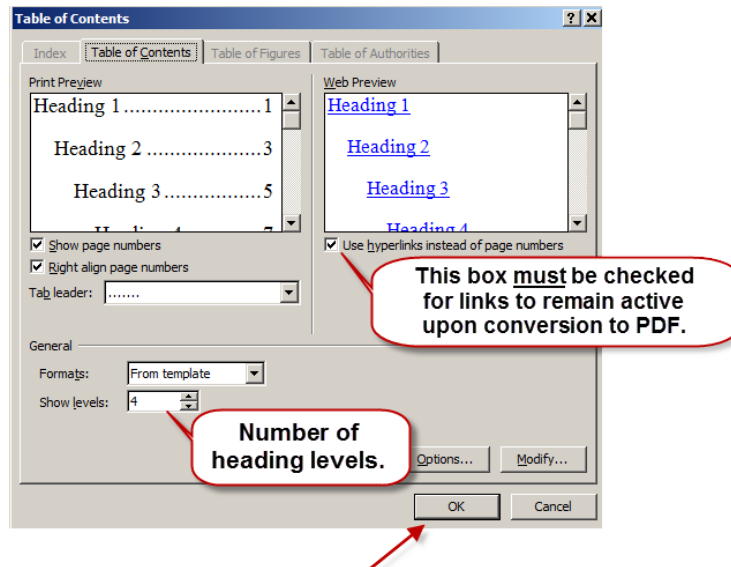


Make selections for
the appearance of the
table of contents.

Click **OK**.

Note: If your table
has more than three
levels, you must set
Show levels to the
correct number.

Note: The “**Use
hyperlinks instead of
page numbers**” must
be checked or the
table of contents will
not have active links
upon conversion to
PDF.



The **Table of Contents**, with active section links, will be inserted into your document.

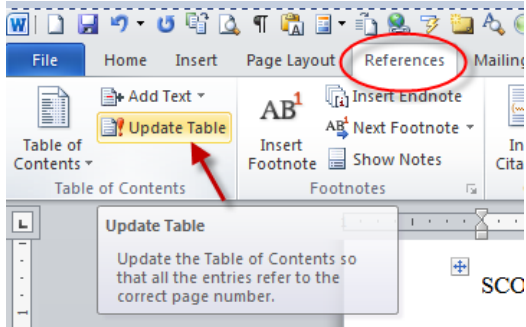
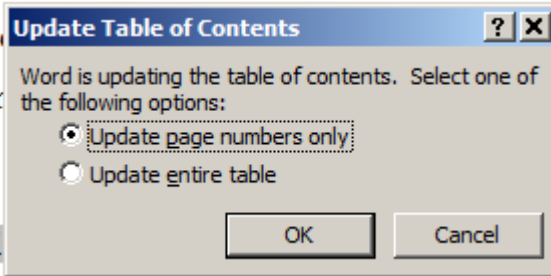
Note: You can manually modify the page numbers to appear as other links in your document, (e.g. blue and underlined).

Table of Contents	
PROCEDURAL BACKGROUND	2
STANDARD OF REVIEW	2
UNDISPUTED FACTS	5
LEGAL ANALYSIS	5
A. ERISA Plan	5
B. ERISA Preemption	7
C. ERISA Claims	8
1. ERISA--The Well-Pleaded Complaint Rule	8
2. The Merits of Plaintiff's Claim for ERISA benefits	10
a) ERISA Standard of Review	10
b) Right to Recovery under the Terms of the Retirement Plan	11
c) Right to "Appropriate Equitable Relief" under ERISA	17

Editing the Table of Contents (if needed)

Inserting the Table of Contents may result in page break changes. For example, hard page breaks or extra lines that were added during drafting to adjust the overall look of the document may no longer be needed, or some may now need to be added.

If the brief was modified after the table of contents was inserted:

STEP	ACTION
<p>From the reference tab on the Word ribbon, select Update Table.</p>	
<p>Select Update page numbers only. Click OK.</p> <p>Note: If you have added or changed a heading, choose Update entire table.</p>	

When the entire document is complete, using MS Word, **Save** the document as a PDF or **Create PDF** in accordance with the [instructions](#) in this Guide.

Note: Do *not* Print to PDF. All active links in your Word document become inactive in PDFs created using Print to PDF.

DRAFTING DOCUMENTS TO INCLUDE LINKS TO CM/ECF

If you are creating a document which will include links to documents filed in CM/ECF, the court requires a consistent citation format that cites the CM/ECF filing number along with the CM/ECF page number, if applicable.

STEP	ACTION																
1	<p>A consistent citation format is required, especially when using CM/ECF LinkBuilder, an automated method for adding links to CM/ECF filings.</p> <p>Please use the following CM/ECF citation formats when creating hyperlinks:</p> <table><tr><th><u>Type of CM/ECF Link</u></th><th><u>Example</u></th></tr><tr><td><i>Link to Basic Docket Entry:</i></td><td>Filing No. 476</td></tr><tr><td><i>Link to Multiple Docket Entries:</i></td><td>Filing No. 476, Filing No. 477, and Filing No. 478</td></tr><tr><td><i>Link to Specific Page of Docket Entry:</i></td><td>Filing No. 476, at ECF p. 2 (document will open at page 2 of docket entry 476.)</td></tr><tr><td><i>Link to Attachment:</i></td><td>Filing No. 476-2 (document opens to attachment 2 of docket entry 476)</td></tr><tr><td><i>Link to Specific Page of Attachment:</i></td><td>Filing No. 476-2, at ECF p. 5 (document opens to page 5 of attachment 2 of docket entry 476)</td></tr><tr><td><i>Link to Multiple Pages (in sequential order)</i></td><td>Filing No. 476, at ECF pp. 5-6</td></tr><tr><td><i>Link to Multiple Pages (not in sequential order)</i></td><td>Filing No. 476, at ECF p. 5; Filing No. 476, at ECF p. 20</td></tr></table> <p>Note: If preferred, any CM/ECF citation may be contained within parentheses or brackets.</p>	<u>Type of CM/ECF Link</u>	<u>Example</u>	<i>Link to Basic Docket Entry:</i>	Filing No. 476	<i>Link to Multiple Docket Entries:</i>	Filing No. 476 , Filing No. 477 , and Filing No. 478	<i>Link to Specific Page of Docket Entry:</i>	Filing No. 476 , at ECF p. 2 (document will open at page 2 of docket entry 476.)	<i>Link to Attachment:</i>	Filing No. 476-2 (document opens to attachment 2 of docket entry 476)	<i>Link to Specific Page of Attachment:</i>	Filing No. 476-2 , at ECF p. 5 (document opens to page 5 of attachment 2 of docket entry 476)	<i>Link to Multiple Pages (in sequential order)</i>	Filing No. 476 , at ECF pp. 5-6	<i>Link to Multiple Pages (not in sequential order)</i>	Filing No. 476 , at ECF p. 5; Filing No. 476 , at ECF p. 20
<u>Type of CM/ECF Link</u>	<u>Example</u>																
<i>Link to Basic Docket Entry:</i>	Filing No. 476																
<i>Link to Multiple Docket Entries:</i>	Filing No. 476 , Filing No. 477 , and Filing No. 478																
<i>Link to Specific Page of Docket Entry:</i>	Filing No. 476 , at ECF p. 2 (document will open at page 2 of docket entry 476.)																
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<i>Link to Specific Page of Attachment:</i>	Filing No. 476-2 , at ECF p. 5 (document opens to page 5 of attachment 2 of docket entry 476)																
<i>Link to Multiple Pages (in sequential order)</i>	Filing No. 476 , at ECF pp. 5-6																
<i>Link to Multiple Pages (not in sequential order)</i>	Filing No. 476 , at ECF p. 5; Filing No. 476 , at ECF p. 20																

STEP	ACTION
2	<p>When drafting your brief, cite to the CM/ECF filing number and CM/ECF page number, if applicable, to which you are citing. For example, assume you are citing to the following page of evidence.</p> <p style="text-align: center;">Doc # 476 Filed 09/12/13 Page 1 of 1</p> <p>The citation within the brief should appear as follows:</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>The exhibits have been disposed of. (Filing No. 476, at ECF p. 1).</p> </div> <p><i>*The citation will link to docket number 476 and opens at page 1.</i></p>

Gathering URLs for Documents Previously Filed in CM/ECF

Now that the filing numbers and associated page numbers, if applicable, are in the brief, you can manually or automatically add links to the electronic record. (To skip this section on how to manually gather URLs, click [here](#) for instructions on how to automatically add links.)

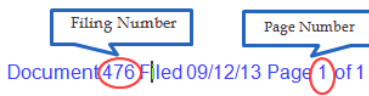
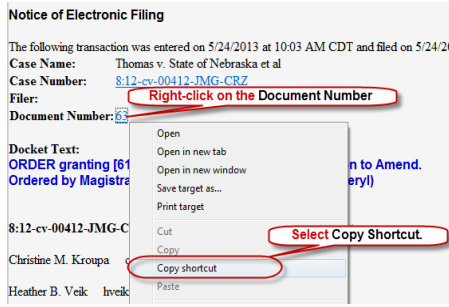
You may manually gather links one of two ways:

- **Option 1:** Saved Notices of Electronic Filing (no charge); or
- **Option 2:** The docket sheet on PACER (PACER charge applies).

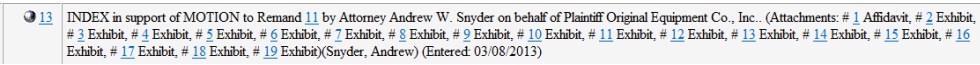
Note: When manually gathering links, you may only gather one link at a time. (LinkBuilder will collect and automatically insert all the links at the same time.)

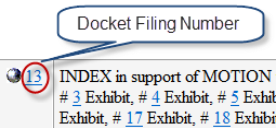
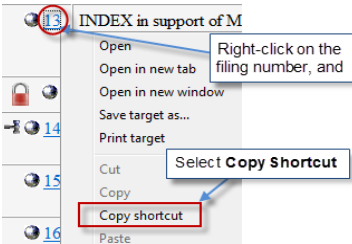
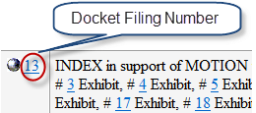
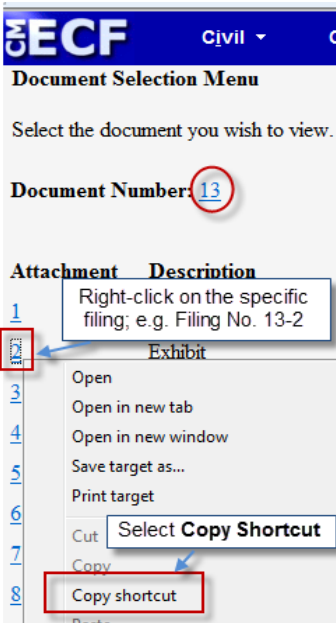
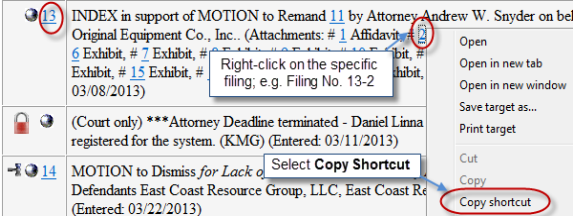
Option 1: To obtain the URL for the CM/ECF document **without incurring a PACER charge:**

STEP	ACTION
1	<p>Collect and save on your computer the Notice of Electronic Filing (NEF) for all filings in the case.</p> <p>Reminder: You can download a document from CM/ECF one time for free when you receive the Notice of Electronic Filing. Charges apply to each additional download of the same document.</p>

STEP	ACTION
2	<p>Documents downloaded from CM/ECF will include a header that identifies the CM/ECF filing number and the page numbers within that filing.</p> 
3	<p>When you are ready to add the link for the document cited, --Retrieve the NEF for that document, --Right-click on the Document Number, and from the drop-down menu that appears, Select Copy Shortcut.</p> 
4	<p>For manually inserting the hyperlink, proceed to the next section, Manually Inserting Links Previously Filed in CM/ECF</p>

Option 2: To obtain the URL for the document from the PACER docket sheet (**PACER charge applies**):

STEP	ACTION
1	<p>Open the CM/ECF docket sheet for the case and scroll to the cited docket filing.</p> 

STEP	ACTION
2	<p>If linking to the main CM/ECF filing,</p> <p>Right-click on the docket filing number, and select Copy shortcut.</p>   <p>If linking to a sub-file within a CM/ECF filing number:</p> <p><i>Either:</i></p> <p>Click on the docket filing number;</p>  <p>A window will open which lists all sub-filings for that docket filing number.</p>  <p>Place your cursor over the link for the document you are citing,</p> <p>Right-click, and from the drop-down menu that appears, and select Copy Shortcut.</p> <p><i>Or</i></p> <p>Right-click on the sub-filing number in the docket text and, select Copy Shortcut.</p> 
3	<p>For manually inserting the hyperlink, proceed to the next section, Manually Inserting Links Previously Filed in CM/ECF</p>

LINKING TO CM/ECF DOCUMENTS

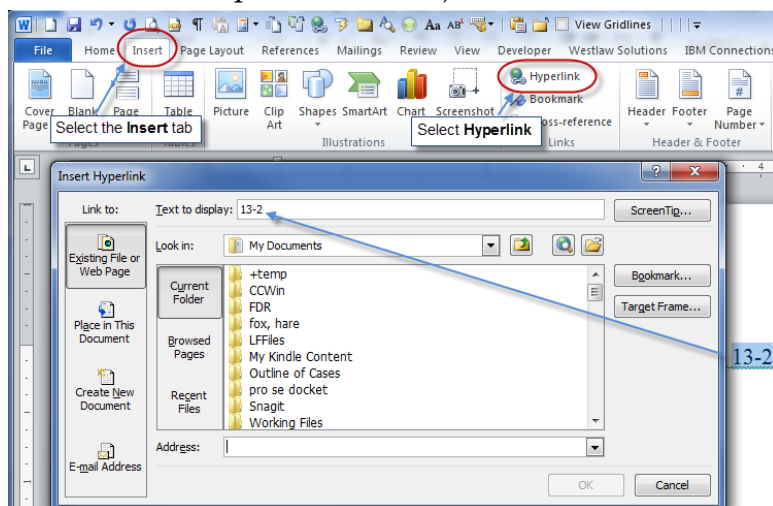
Below are three methods in which to insert hyperlinks in a document to be filed in CM/ECF:

- [Manually Inserting Links to Documents Previously Filed in CM/ECF](#);
- [Using LinkBuilder to Insert Links to Documents Previously Filed in CM/ECF](#); and
- [Add Links to Attachments to the Document Being Filed in CM/ECF](#)

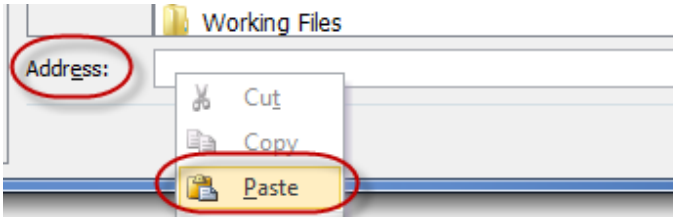
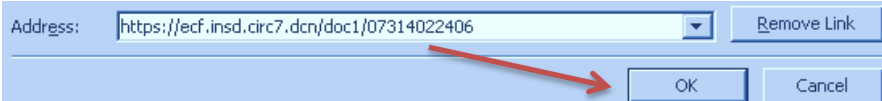
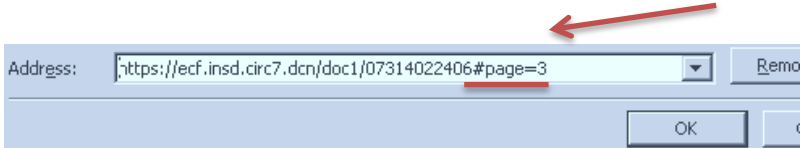
Manually Inserting Links to Documents Previously Filed in CM/ECF

To manually add the links you have copied from the docket to the MS Word document you are drafting:

STEP	ACTION
1	Follow the steps above for gathering url links .
2	In the brief, use your cursor to select the citation to which a hyperlink will be added. <div>The defendant is a Colorado citizen (Filing No. 13-1, at ECF p.3)</div>
3	Select the Insert tab on the MS Word ribbon, then select Hyperlink . An Insert Hyperlink dialog box will appear. (Or right-click and select Hyperlink from the drop-down menu.)



Note: The text you selected will automatically appear in the “Text to display” line.

STEP	ACTION
4	<p>Place your cursor in the Address box of the Insert Hyperlink dialog box. Right-click. From the drop-down that appears, select Paste. (The link to paste will be the link gathered by following the instructions in the previous section.)</p> 
5	<p>The link to the first page of the filing will appear.</p> <p><i>To link to the filing only, or to only page 1 of the filing, click OK. The link to the citation will be added in your brief.</i></p> 
6	<p><i>To link to the specific page number of the CM/ECF filing that you are citing,</i></p> <p>In the address box, scroll to or place your cursor at the end of the link address.</p> <p>Add the following text: #page=<page number> . For example,</p> <p>To link to page number 3 of a filing, add #page=3. Click OK and the link to the page will be added to the citation in the brief.</p>  <p>Note: Use the page numbers assigned by CM/ECF when linking to pages in documents filed in CM/ECF. Do not use Bates numbers or other numbering assigned to the record by the parties.</p>
7	<p>Convert the brief to a PDF following the instructions in this Guide.</p>

STEP	ACTION
8	File the PDF version of the document in CM/ECF. Note: It is not necessary to re-file or re-attach the documents to which you are linking if they have been previously filed in CM/ECF.

Using LinkBuilder to Insert Links to Documents Previously Filed in CM/ECF

The CM/ECF LinkBuilder add-in for Microsoft Word automates the creation of cross-document hyperlinks between filings in the federal court's CM/ECF system. LinkBuilder will search a Microsoft Word document for citations to CM/ECF filings and insert a hyperlink to the corresponding file in the CM/ECF system, so long as the [citation formats](#) are used correctly. LinkBuilder can recognize and link to attachments to the record, as well as page specific references to create pinpoint access to specific information in the case.

For more information and to download the LinkBuilder add-in tool for Microsoft Word, click on the link below:

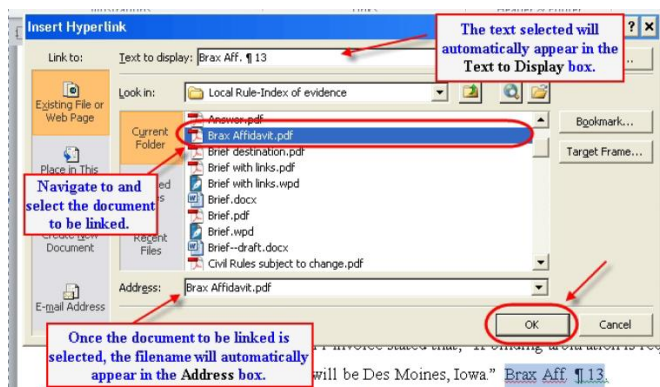
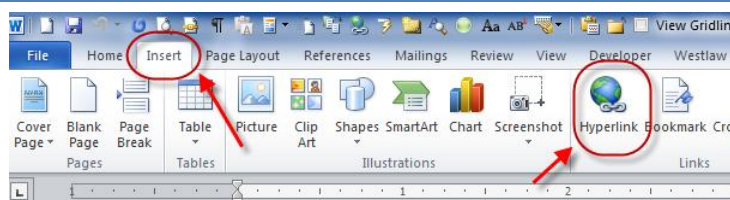
<http://www.ned.uscourts.gov/internetDocs/cmecf/LinkBuilderforMSWord.pdf>

Once all links have been inserted into the document using LinkBuilder, follow the [instructions](#) in this Guide for converting the final document to PDF before filing in CM/ECF.


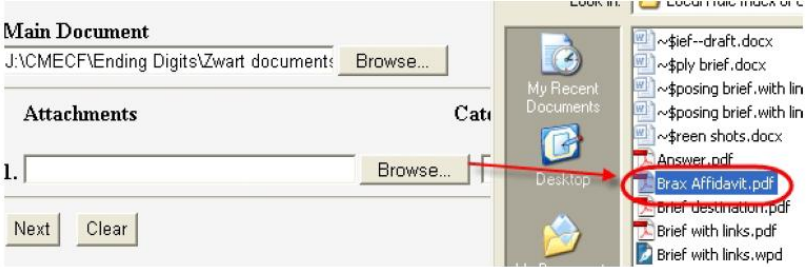
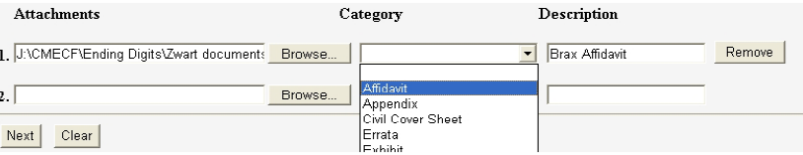
Adding Links to Attachments to the Document being Filed in CM/ECF

If a document cited in your brief has not previously been filed in CM/ECF, you may link to the document within your brief only if the document is filed as an attachment to your brief. Follow the steps below to add active hyperlinks to documents you will be filing as brief attachments in CM/ECF.

STEP	ACTION
1	Save all attachments/exhibits separately into a single folder on your computer that you will cite in your brief. <u>The documents must be in PDF format.</u>
2	While drafting your brief, include the citations to the documents saved on your computer.
3	Using your cursor, select the text to which a link will be added. for any seed disputes, the 2011 invoice stated that, “If binding arbitration is required (see bag), the place of arbitration will be Des Moines, Iowa.” Brax Aff. ¶ 13 .
4	On the Insert ribbon, select Hyperlink . (Or right-click on the text to be linked and select Hyperlink from the drop-down menu.)
5	In the Insert Hyperlink dialog box: <ul style="list-style-type: none"> • Navigate to cited file saved on your computer; • Select the file; and • Click OK.
6	A link to the file will be added to the text. If you hover over the link with your cursor, you will see the link address. and conditions sheet, and again putting Plaintiffs on notice that ar for any seed disputes, the 2011 invoice stated that, “If binding ar bag), the place of arbitration will be Des Moines, Iowa.” Brax Aff. ¶ 13 (emphasis added). Add links to all the citations in your brief accordingly. Note: Specific page links can be added by following Step 6 in the previous section . Use the PDF page number, not a Bates number or footer page number, for the citation.
7	Save the brief as a PDF as described in these instructions in this Guide.



file:///\\winfs11.ned.circ8.dcn\data\red
cmecf\ending digits\zwart documents\it
materials\local rule-index of
evidence\brax affidavit.pdf
Click to follow link

STEP	ACTION	
8	File the brief and evidence as follows:	
	a	<p>Following the normal procedure for filing briefs in CM/ECF, browse to and select your document, <i>i.e.</i> Brief with links.pdf, as the main document.</p> 
	b	<p>Browse to and select as an Attachment each PDF file to which a link was created in your brief.</p> 
	c	<p>Using the drop-down list, select the type of document attached, and provide a written description of the document. (Note: The written description will become the name assigned as a PDF bookmark when the file is downloaded by the court. However, a unique description is needed if similarly labeled documents are cited.)</p>  <p>Repeat the foregoing steps until all cited evidence is filed as an attachment to your brief.</p>
	d	<p>When all evidence attachments have been added to the brief, click Next and complete the remaining steps for filing the brief in CM/ECF. Once filed, the links in the brief will link directly to the evidence filed of record as attachments to the brief.</p>

AUTOMATED LINKS TO LEGAL CITATIONS

Links to legal citations can be added manually or, assuming the software is compatible with your computer and word processing software, by using automated linking software available through Westlaw or Lexis.

Access to Linking Software

Tool	Cost	URL
Westlaw InsertLinks	Must purchase a West BriefTools subscription. Estimated cost: \$100/month for small firms; \$300 to 500/month for larger firms (10 licenses)	http://legalsolutions.thomsonreuters.com/law-products/solutions/brief-tools?searchterms=brief+tool
Shepard's Links 2008	Lexis is currently not selling a software subscription which will insert links to documents that will remain active upon conversion to PDF. The last version of such software was created in 2008 and can be downloaded from the Lexis/Nexis website for free.	http://support.lexisnexis.com/lnownload/record.asp?ArticleID=6056 Note: The Shepard's BriefSuite dictionary is getting old and may not recognize some of the newer reporters. Its accuracy as a linking tool is inconsistent.
Lexis for Microsoft Office	This Lexis software product will add links for research and drafting purposes, but those links are lost upon conversion to PDF. Lexis is investigating the issue.	http://www.lexisnexis.com/en-us/products/lexis-for-microsoft-office.page

Linking Software – Compatibility Information

The following graph outlines the compatibility of Shepard's Links 2008, West InsertLinks, and Lexis Links for Microsoft Office for inserting links into MS Word and WordPerfect documents with a Windows XP (SP3) 2GB Memory, Windows Vista (SP2) 4GB Memory, or Windows 7 – 4GB Memory computer.*

	Shepard's Links 2008	Lexis for Microsoft Office	West InsertLinks
MS Word 2010		X**	X***
MS Word 2007		X**	X***
MS Word 2003	X		X***
MS Word 2000	X		
WordPerfect X6****			
WordPerfect X4 – X5			X
WordPerfect X3	X		X
WordPerfect 10 – 12	X		

* The West and Lexis linking software programs cannot be used on Apple computers. Moreover, although Shepard's Links was not designed to operate on Windows Vista and Windows 7 (as reflected in the Lexis literature), it is working on these computer systems.

** Lexis for Microsoft Office is being developed and tested. However, in its current stage of development, any links added by Lexis for Microsoft Office are being stripped out upon conversion to PDF. Lexis is investigating this issue.

*** Westlaw product information states InsertLinks is compatible with both 32- and 64-bit Microsoft Word. However, while it works well with 32-bit Word, InsertLinks is not fully compatible or useful with 64-bit Word.

**** West currently has no linking software compatible with WordPerfect X6. West indicates it may develop and release this product during the summer of 2013.

Westlaw InsertLinks

InsertLinks is a Westlaw computer software program which scans Microsoft Word or Corel WordPerfect¹ documents to locate legal citations, and then automatically inserts hyperlinks to the Westlaw internet address (url) for those citations into the word processing document.

See attached InsertLink example-Word

InsertLink example-WordPerfect

Installing West InsertLinks

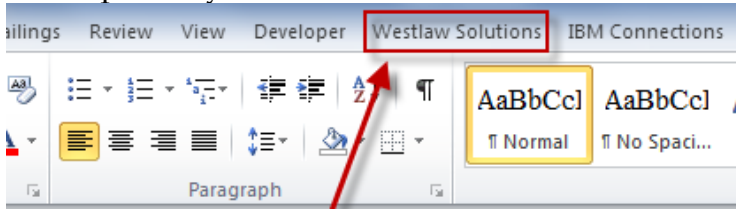
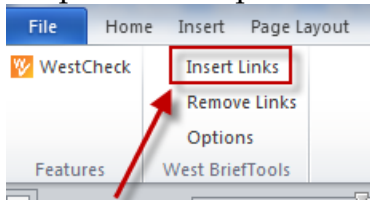
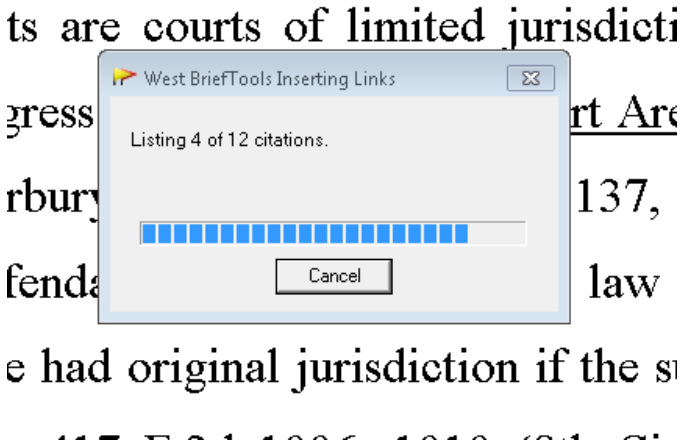
InsertLinks is part of the West BriefTools suite, and a BriefTools subscription is required in order to use this software.

- The current West BriefTools product is Version 2.7.2039, which was updated on December 10, 2012.
- The attached BriefTools Software Download instructions outline the system requirements and provides instructions on how to install West BriefTools.

Using West InsertLinks

Once InsertLinks software is installed, Westlaw links can be installed automatically in Microsoft Word documents using the following steps:

¹ Currently, InsertLinks is not compatible with, and cannot be used for, automatically inserting links into WordPerfect X6 documents. It does, however, work with prior versions of WordPerfect.

STEP	ACTION
1	<p>With the Microsoft Word document to which you are adding links open on your screen:</p>  <p>Select the Westlaw Solutions tab on the Word ribbon.</p>
2	<p>The West BriefTools options will open.</p>  <p>Select InsertLinks.</p>
3	<p>The InsertLinks software will begin searching the document for citations and inserting the appropriate links.</p>  <p>The box depicted above will disappear when the process is complete and all links are installed.</p>

Shepard's Links 2008

Shepard's Links is a Lexis computer software program which scans Microsoft Word or Corel WordPerfect² documents to locate legal citations, and then automatically inserts hyperlinks to the Lexis internet address (url) for those citations into the word processing document.

² See compatibility graph above.

Reminder: Although free, Shepard's links has not been updated since 2008 and provides inconsistent auto-linking results.

Installing Shepard's Links

Shepards Links is part of the Shepard's BriefSuite.

- Shepard's BriefSuite has not been updated since 2008.
- The attached BriefSuite software download instructions provide a step-by-step description on how to install Shepard's BriefSuite.

MANUALLY INSERTING LEGAL CITATION LINKS

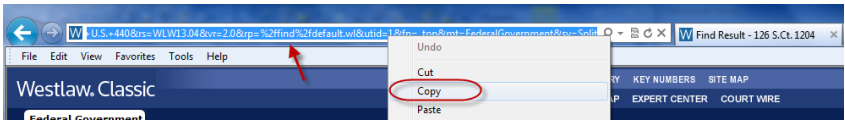
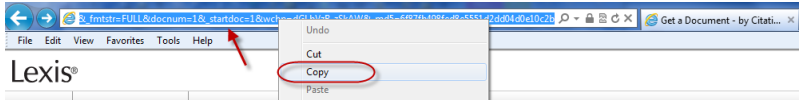
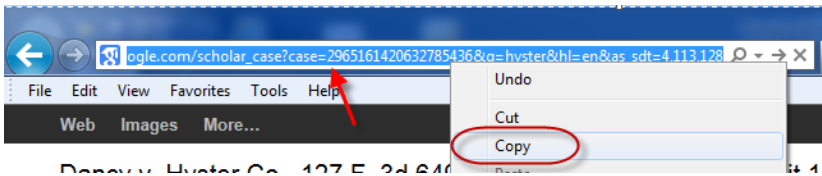
As previously described, hyperlinks to documents filed in CM/ECF can be manually added to a document about to be filed. It is also possible to manually create links to documents available through commercial legal websites (e.g., Lexis or Westlaw).

Manually adding links can be labor intensive if the document is long, but the process is not difficult. And even if you are primarily using software to add links to a document, understanding the underlying mechanics of hyperlinking within WordPerfect and Word documents is helpful and may be necessary if, for example, you need to make corrections to the automatically created links.

Manually Creating Links to Online Research Resources

The process for manually adding links to Westlaw, Lexis, Google Scholar, or any other online research resource (LoisLaw, FastCase, etc.) is the same.

STEP	ACTION
1	<p>In the brief, use your cursor to select the citation to which you are adding a link.</p> <p>The United States Supreme Court has held that the FAA “embodies the national policy favoring arbitration.” Buckeye Check Cashing, Inc. v. Cardegna, 546 U.S. 440, 443 (2006). See also Mastrobuono v. Shearson Lehman Hutton, Inc., 514 U.S. 52, 56 (1995);</p>


STEP	ACTION
2	<p data-bbox="418 247 1344 321">Sign into the legal research website and open the cited document. Select the url address for the document.</p> <p data-bbox="418 365 1040 405">Right-click, and Copy the address. See <i>e.g.</i>,</p> <div data-bbox="500 449 1339 569">  <p>This screenshot shows the Westlaw Classic website in a browser. The address bar contains a long URL. A right-click context menu is open, and the 'Copy' option is circled in red. A red arrow points to the address bar.</p> </div> <p data-bbox="894 583 946 617">OR</p> <div data-bbox="521 636 1315 735">  <p>This screenshot shows the Lexis website in a browser. The address bar contains a URL. A right-click context menu is open, and the 'Copy' option is circled in red. A red arrow points to the address bar.</p> </div> <p data-bbox="894 751 946 785">OR</p> <div data-bbox="509 804 1326 978">  <p>This screenshot shows a Google Scholar search result in a browser. The address bar contains a URL. A right-click context menu is open, and the 'Copy' option is circled in red. A red arrow points to the address bar.</p> </div> <p data-bbox="418 1024 1375 1098">Note: Check your local rules for any authority or limitations on the legal research websites to which links are permitted.</p> <p data-bbox="418 1102 1375 1218">Note: Some attorneys have reported difficulty using this method to insert links to Lexis research. An alternative option is described in Appendix A.</p>

STEP	ACTION	
3	a	<p>Select the Insert ribbon, then select Hyperlink. An Insert Hyperlink dialog box will appear.</p> <p>Note: The text you selected will automatically appear in the “Text to display” line.</p>
	b	<p>Place your cursor in the Address box of the Insert Hyperlink dialog box. Right-click. From the drop-down that appears, select Paste.</p> <p>Click OK.</p>
	c	<p>The link to the citation will be added in your brief.</p>

Manual Links to Court Websites

You may wish to cite to published opinions on a court’s website. To do so:

STEP	ACTION
1	<p>In your brief, select the text to be linked.</p> <p>the police from potential danger.’” United States v. Taylor, 636 F.3d 461, 464 (8th Cir. 2011)(quoting South Dakota v. Opperman, 428 U.S. 364, 369 (1976); see also United</p>

STEP	ACTION
2	<p>Locate and copy the URL address for the citation. See <i>e.g.</i>,</p>  <p>The screenshot shows the website for the Eighth Circuit, Michael E. Gans, Clerk of Court. It features a navigation bar with links: About the Court, Document Filing(CM/ECF), Appeal Information, Rules & Procedures, and CJA Information & Forms. Below the navigation bar is a breadcrumb trail: Home >> All Opinions >> Today's Opinions >> Case Number >> Release Date >> Party Name >> David. A disclaimer states: "DISCLAIMER: The following unofficial case summaries are prepared by the clerk's office as a courtesy to the reader. They are not part of the opinion of the court." The case name "christopher taylor" is visible. A right-click context menu is open over a URL, with the "Copy shortcut" option highlighted. A red callout box with the text "Right-click" points to the menu. A red arrow points to the "Copy shortcut" option.</p>
3	<p>Referring to the previous section, “Manually Creating Links to Online Research Resources,” complete Step 3.</p>

FINAL EDITING

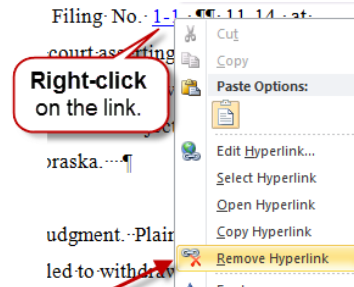
Removing Links

To remove *a specific link* in a Word document:

Place your cursor over the link,

Right-click, and from the drop-down that appears,

click **Remove Hyperlink**.



To remove *all* links in a Word document:

Press **Ctrl + A** to select the entire document, then

Ctrl + Shift + F9.

Editing Linked Text

To make additions to or change hyperlinked text in a Word document:

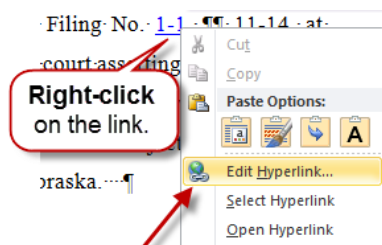
1. Place your cursor at the end of the linked text.
2. Use the back arrow on your keyboard to move your cursor in the linked text to the position where the text must be added or changed, and
3. Type in your changes.

Or

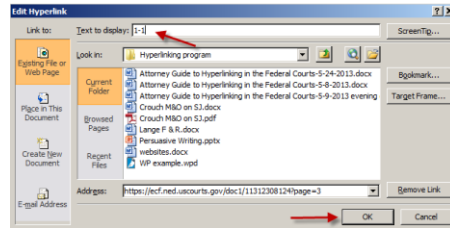
Place your cursor over the link,

Right-click, and from the drop-down that appears, and

click **Edit Hyperlink**.



In the **Edit Hyperlink** box that opens,
Type any changes in **Text to display**.
Click **OK**.



PUBLISH TO PDF – RETAINING THE HYPERLINKS

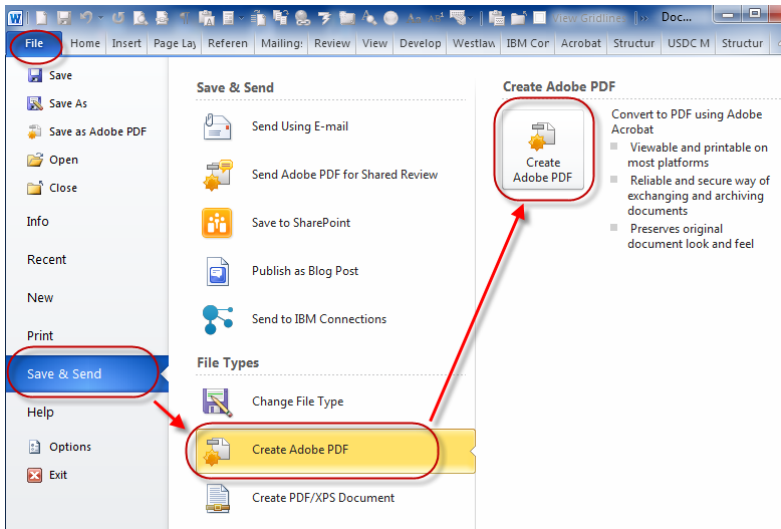
All documents filed in CM/ECF are in PDF format, so all documents created for filing must be converted to a PDF document. To include hyperlinks in your filed documents, place all the links into the document using your word processing system before converting the document to a PDF format.

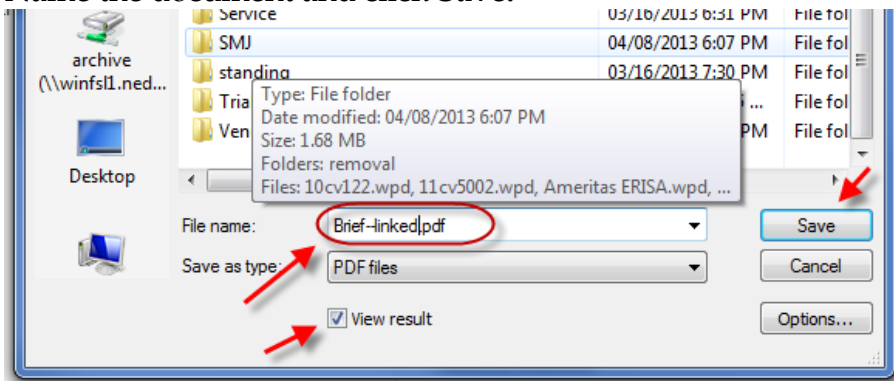
Once all links are in the word processing version of your document, use your word processing software to save or convert your briefs, or other documents you have created for filing, in a PDF format.

Note: Do NOT use **Print to PDF** to create a PDF of a brief with hyperlinks—the hyperlinks will be lost. Do NOT print the document and scan it to PDF format.

Conversion to PDF

MS Word has several methods for saving (“publishing”) a document in PDF format, including the following methods:

STEP	ACTION
1	<p>Select the File tab on the MS Word ribbon;</p> <p>from the drop-down menu, select Save and Send;</p> <p>and from the choices now available, choose Create Adobe PDF from the File Types list,</p> <p>then</p> 

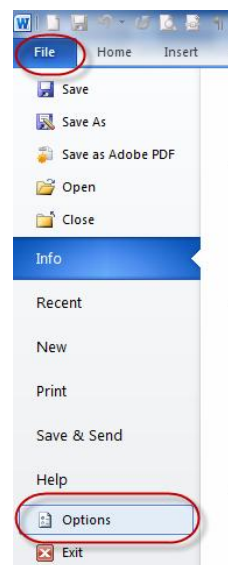
STEP	ACTION
2	<p>Navigate to the location where you want to save the document. Name the document and click Save.</p>  <p>Check View Result if you want the PDF document created to open upon conversion.</p>
3	<p>After the document is published to PDF, you may upload it to CM/ECF using typical filing processes. With the exception of filing a document with links to its own attachments (discussed previously), no special steps are needed for filing a hyperlinked document on CM/ECF.</p>

Note: If you have Adobe Acrobat Standard or Pro loaded on your computer, you may also add the Adobe Acrobat tab and ribbon to your MS Word ribbons and use the Acrobat ribbon to convert documents to PDF.

To do so:

Select the **File** tab on the MS Word ribbon.

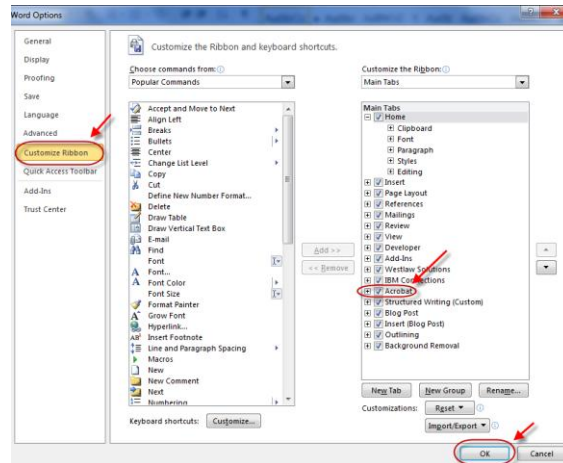
Choose **Options**.



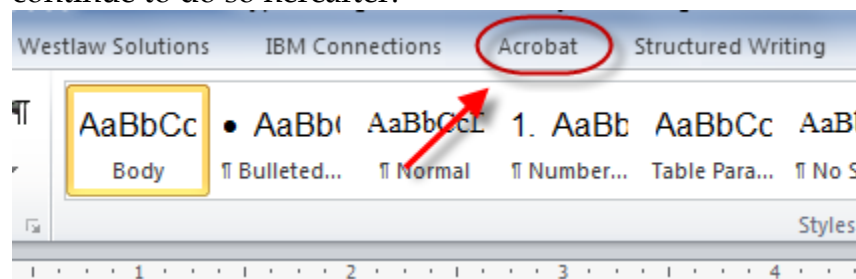
Select **Customize Ribbon**.

Add the **Acrobat** tab.

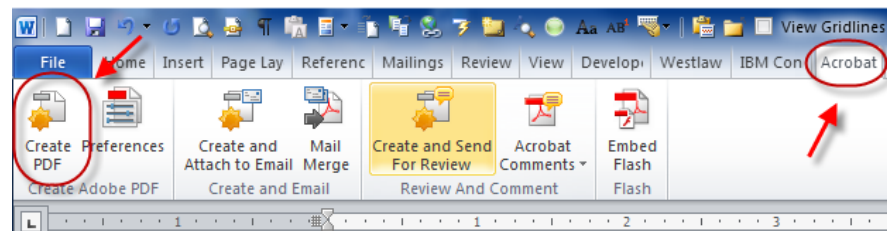
Click **OK**



An **Acrobat** tab will now appear on the MS Word ribbon, and will continue to do so hereafter.



After the **Acrobat** tab is added, save a document as a PDF by selecting the **Acrobat** tab, and then **Create PDF**.



After the document is published to PDF, you may upload it to CM/ECF using typical filing processes. With the exception of filing a document with links to its own attachments (discussed previously), no special steps are needed for filing a hyperlinked document on CM/ECF.

ADDITIONAL TIPS

Viewing a Website Location Opened from a Link in a CM/ECF Filing

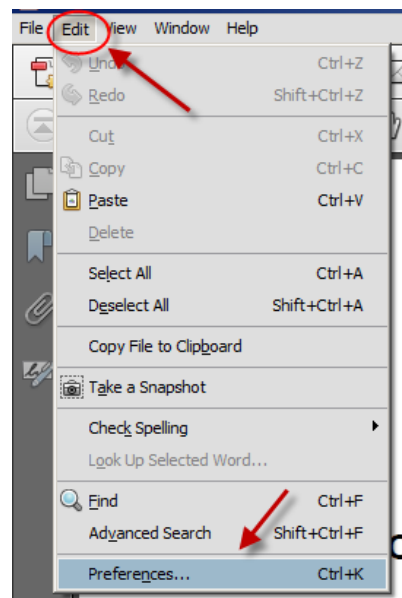
When opening a PDF document filed in CM/ECF, make sure you are opening PDFs in your PDF software and not within the Web browser itself. Opening the CM/ECF documents in the web browser will result in unnecessary toggling between the document opened in CM/ECF and any website locations opened from links within that CM/ECF document, and will make it difficult or impossible to display the CM/ECF document on one screen and the website location on another.

For those who use Adobe Acrobat, this setting adjustment is made as follows:

With an Adobe Acrobat document open,

Click **Edit**,

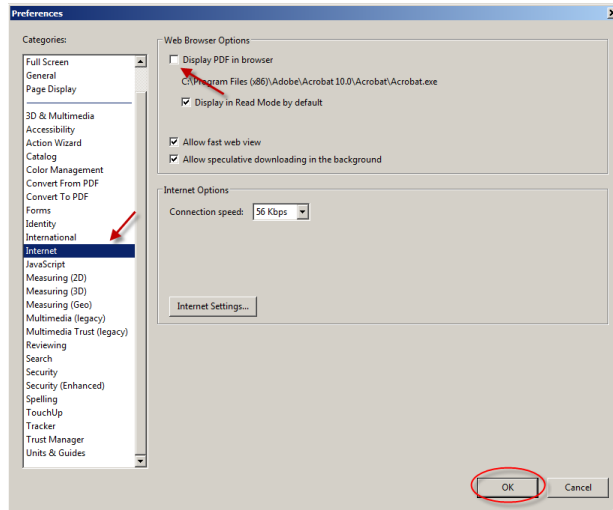
then **Preferences**.



From the Categories, scroll and select **Internet**.

Make sure **Display PDF in browser** is *not* selected.

Click **OK**.



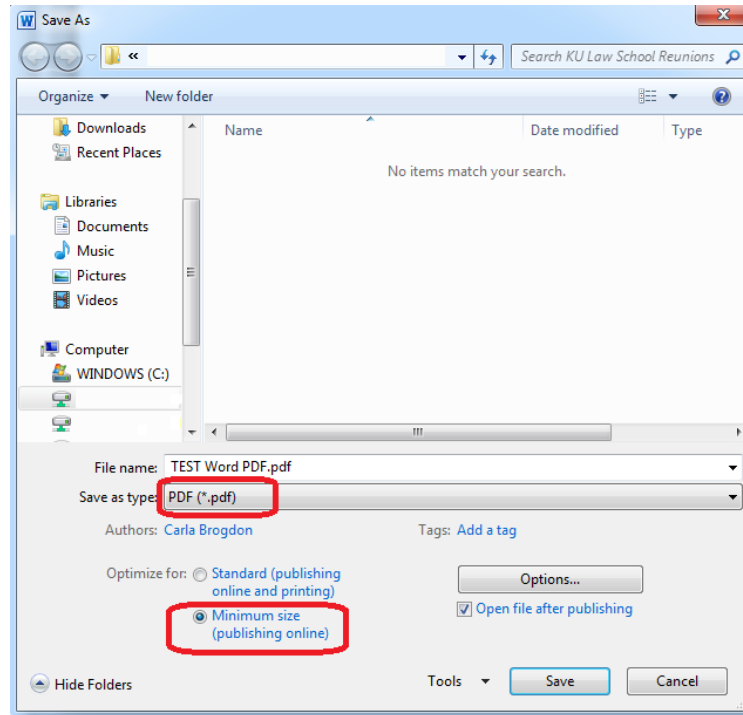
After you change this setting, you will need to close and reopen your Web browser before opening CM/ECF filings.

PDF/A documents

Depending on how a PDF/A document is produced, masked hyperlinks may not be preserved. If the document will contain masked hyperlinks, the user should create the document in Word 2007 or 2010 and use the “Save As” (2007 and 2010), “Save as Adobe PDF” (2010), or “Adobe PDF” (2007) methods to produce the PDF/A file.

Optimized PDFs to reduce file size

Large documents or documents containing forms, photos or graphics should be saved as an optimized PDF to reduce file storage size. Select **File** and Click **Save As**. From the **Save as type** dropdown menu, select **PDF**. From the **Optimize for** radio buttons, Select **Minimum size (publishing online)**. Click **Save**.



This Guide was produced by the Nebraska District Court, and slightly modified by the Southern District of Indiana. If you have any questions, concerns, or comments, please contact the Southern District of Indiana's CM/ECF Administrator at (317) 229-3700.